

CSI GAS STATION AND C-STORE STUDY

Ignite Your Growth: The Ultimate Roadmap to Customer Experience Excellence in the Canadian Fuel & Convenience Sector

Unlock the Future of Your Forecourt and C-Store with the Ipsos CX Syndicated Study

In a market shaped by rising consumer expectations, shifting fuel dynamics, and intensifying competition, understanding the complete customer journey is no longer a luxury – it's a necessity. The Canadian Fuel and convenience landscape is more competitive than ever. Are you equipped to win?

What is the CSI Gas and C-Store Study?

Ipsos Canada is proud to introduce a groundbreaking syndicated study to our suite of CSI (Customer Satisfaction Index) studies, meticulously designed to provide you with an Aaled view of the customer experience at Fuel stations and convenience stores across the country. This new study is an indispensable strategic tool engineered to help you navigate the evolving market, outperform your competitors, and drive sustainable growth.

Why this study is your new competitive advantage?

The CSI Gas Station and C-Store Syndicated program is **conducted once a year with a dual-phase approach**, combining broad-market quantitative insights with granular, real-world performance validation through a Mystery Shopping program.

Component 1: The National CX Landscape (Quantitative Survey)

We will survey 7,000 Canadian consumers who have recently visited a Fuel station to pump gas, or go into the c-store, or both. This large-scale study provides a rock-solid foundation for understanding:



Market
FUNDAMENTALS



What **MATTERS**
MOST



EXPERIENCE
BENCHMARKING

Component 2: The How of Execution (Mystery Shopping)

Go beyond perceptions with 100 mystery shops per designated brands. Our trained evaluators will visit specific locations to provide an objective, detailed assessment of the real-world customer experience. This phase is designed to:



Measure
COMPLIANCE



Benchmark
PERFORMANCE



Identify
ACTIONABLE GAPS

Brands Covered:

Fuel Station Brands:

- CANADIAN TIRE Fuel+
- CIRCLE K
- CO-OP Fuel
- COSTCO
- COUCHE-TARD
- ESSO
- HUSKY
- IRVING OIL
- MOBIL
- PETRO-CANADA
- PIONEER
- SHELL
- ULTRAMAR

C-store Brands:

- 7 ELEVEN
- CIRCLE K
- CO OP
- COUCHE TARD
- HUSKY MARKET
- MARCHE EXPRESS
- NEEDS
- NEIGHBOURS
- ON THE RUN
- PETRO-CANADA
- SHELL SELECT
- SUPER STOP

**UNDERSTAND HOW
YOUR BRAND COMPARES
TO INDUSTRY LEADERS
AND PEERS!**

How can fuel and c-store retailers leverage this study?

Ipsos Customer Satisfaction Index (CSI) programs have helped leading Canadian brands benchmark performance, identify experience gaps, and prioritize the moments that matter most to customers. This new study brings that same disciplined approach to the fuel and convenience sector. Here are 6 ways you can benefit from this study:

1

Competitive Intelligence & Market Positioning

- Access detailed performance data on how your brand stacks up against key competitors on experiential KPIs
- Understand your relative strengths and vulnerabilities in both fuel purchase and C-store operations
- Mystery shopping component provides objective, real-world validation of customer perceptions vs. actual delivery

2

Revenue Growth Opportunity Identification

- Pinpoint which experiential improvements drive cross-selling between forecourt and C-store
- Understand what attracts customers to specific brands and locations (convenience, loyalty programs, amenities, pricing perception)
- Identify untapped customer segments and their unique needs to expand market share

3

Comprehensive Journey Diagnostics & Pain Point Identification

- Map every critical touchpoint from arrival to departure across both forecourt and C-store experiences
- Identify specific friction points impacting customer satisfaction (wait times, pump functionality, payment process, store navigation, checkout efficiency)
- Benchmark your performance against industry standards and top performers at each journey stage

4

Actionable Customer Experience Metrics

- Receive clear CX performance indicators linked to business outcomes (visit frequency, basket size, brand loyalty)
- Track progress showing market trends and performance evolution

5

Strategic Thought Leadership & Executive Consultation

- Annual executive briefings with industry trends and forward-looking insights
- Custom deep-dive sessions to address your specific strategic challenges
- On-demand CX advisory and workshop to support implementing CX improvements

6







Direct Expert Access & Implementation Support

- Ongoing access to Ipsos CX specialists with deep Fuel station/C-store expertise
- Practical implementation roadmaps tailored to your brand's specific opportunities
- Real-time guidance on responding to market shifts and competitive moves





Program Scope

We provide a detailed assessment of the entire customer experience, including:

CORE CX METRICS

 Overall satisfaction	 Likelihood to recommend (NPS)	 Likelihood to return	 Value for Money	 Trust	 Emotional connection
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BRAND HEALTH & LOYALTY

 Usage	 Favourite brand	 Share of wallet & Spend	 Loyalty program usage and effectiveness
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FORECOURT EXPERIENCE DEEP DIVE

- Cleanliness of pump area & surroundings
- Feeling of safety & adequate lighting
- Wait times & pump availability
- Ease of payment & fuel grade selection
- Bathroom accessibility & cleanliness
- Operating hours (24/7 availability)
- Additional services (e.g. car wash)

C-STORE DEEP DIVE

- Variety & quality of food/beverages
- Staff friendliness & helpfulness
- Store cleanliness & organization
- Availability of non-food items
- Checkout efficiency & wait times

Deliverables

A toolkit for transformation that includes:

- 1 Comprehensive Insights & Recommendations Report:**
A detailed report, rich with data visualization and strategic analysis. Customization options are available to focus on what matters most to you.
- 2 Key Driver Analysis:**
A sophisticated analysis identifying the most impactful drivers of customer satisfaction and loyalty for the total market.
- 3 Executive Presentation:**
A formal, in-person or virtual presentation of the key findings and strategic recommendations to your leadership team.
- 4 Optional Booster Samples:**
The ability to purchase additional survey completes or mystery shops for deeper dives into specific regions or customer segments (available at an additional cost).
- 5 Optional Activation Workshop:**
For subscribers who want to accelerate their path to CX excellence, we offer a fully customized, on-site or virtual Activation Workshop.

Survey Duration



20 minutes survey duration:

With those who visited a Fuel station to purchase fuel and/or shop the convenience store in a Fuel station in the past month.

Natural fallout of the sample by brand within region.

How We Do It?

Data Collection

WAVE

2026 JULY '26 – AUGUST '26

The quantitative survey will use an online data collection methodology.

The mystery shopping study will be conducted through in-person visits.

HOW DO I PURCHASE THE STUDY?

The journey to service excellence starts now. Don't let your competitors get there first.

Contact us today for pricing and to secure your place as a foundational subscriber.

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